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World Production and Trade

United States
Department of
Agriculture

Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 13-88

March 30, 1988

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

GRAIN AND FEED

THAILAND'S Exportable Corn Supplies Still in Question. Thailand's exportable corn supplies for 1987/88, currently expected to be 850,000 tons, are still uncertain given the drought-reduced 1987/88 corn crop and the sluggish rate of shipments for the first six months of the international marketing year. Thailand normally ships about two-thirds of its exportable supplies in that period, but only about 300,000 tons have been shipped. A possible explanation for the lagging pace is that unusually large quantities of corn are being held off the market in anticipation of higher domestic prices. Release of these privately held stocks, in conjunction with the availability of new crop Thai corn in July, and thus lower prices, could lead to extraordinarily heavy shipments in the July-through-September quarter.

OILSEEDS AND PRODUCTS

JAPANESE Reduce Peanut Quota Again. On March 15 Japan announced its peanut import quotas for the second half of the the Japanese fiscal year (April/March), according to the U.S. agricultural counselor in Tokyo. Overall, the peanut quota for 1987 was reduced to 54,000 tons from 54,300 tons in 1986 and 57,000 tons in 1985. Although the overall quota for the year is lower, the quota for the second half of the year is higher than last year's quota for the second half--26,600 tons compared to 23,400 tons in 1986 and 25,900 tons in 1985.

INDIA Lifts Duty Exemptions and Encourages Area Expansion for Oilseeds. India has removed its customs duty exemptions for oilseeds. The scheduled rate of 105 percent is currently being applied, resulting in no oilseed imports. This decision was surprising in light of the short oilseed crop and the expected 30-percent jump in vegetable oil imports. Moreover, palm kernels were added to the list of duty-exempted oilseeds last December, raising expectations that oilseed imports would be encouraged this year. India is the largest importer of vegetable and marine oils; 1987/88 imports are a forecast 1.990 million tons or about 12 percent of world imports.

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In a related item, the Indian government is encouraging farmers to plant oilseeds instead of wheat in traditional irrigated wheat areas with limited irrigation facilities. The government argues that: the rabi (spring) harvested oilseed crop requires less water than wheat; oilseeds are more profitable than wheat sown after mid-December; and domestic oilseed demand is far greater than supply.

DAIRY, LIVESTOCK AND POULTRY

TAIWAN'S Farmers Protest Imports of U.S. Poultry. Protests continue in Taiwan over the recent upsurge in U.S. turkey exports to Taiwan. The United States exported 770 tons of turkey to Taiwan in the first two months of 1988, well above last year's levels. Taiwan's farmers claim that turkey imports from the United States have seriously depressed poultry prices in Taiwan. Recently, Taiwan agreed to begin reissuing turkey import licenses starting in May, following trade negotiations with U.S. government officials. Taiwan had banned turkey imports from the United States in February in an effort to protect its domestic poultry industry.

JAPANESE Importers Suspend Purchases of Pork From Taiwan. Japanese importers reportedly have stopped purchasing pork products from Taiwan following the discovery of sulfanilamide residues in 4.4 tons of pork imported from Taiwan on March 14. Japan's Ministry of Health and Welfare will begin inspecting all pork imports from Taiwan for sulfa residues. Previously, only 10 percent of Taiwan's pork exports to Japan were tested. It is not believed, however, that this problem will remain unresolved long enough to cause lasting trade effects which might significantly benefit U.S. pork exporters.

Pork was Taiwan's most important agricultural export in 1987, with exports of nearly 137,000 tons, most of which was shipped to Japan. Taiwan is the largest supplier of pork to Japan, and is an important competitor for U.S. pork exports in the Japanese market.

FRUITS

MEXICAN Strawberry Production Continues To Expand. Mexico's 1987/88 strawberry harvest is forecast to reach a record 120,000 tons, 32 percent greater than the bumper crop a year ago. Generally favorable weather prevailed throughout the growing season despite scattered frosts during late January and early February. Surprisingly, the frosts proved beneficial by thinning the bloom and delaying the peak harvesting period thus preventing excessive price reductions due to seasonal oversupplies.

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The main reason for this season's projected record output is a 26-percent increase in area made possible by a joint decision of the Mexican government and the National Association of Horticultural Producers that permitted the planting of additional land. An additional factor was the considerable increase in plantings outside the authorized quota--mainly by growers in the largest producing region, Michoacan. Average yields for the 1987/88 season are expected to increase to 20 tons per hectare--5 percent greater than last year. Crop quality appears good with approximately 34 percent of the fruit graded "A", 51 percent "B" and 15 percent grade "C".

Production of frozen strawberries is currently estimated at a record 55,385 tons, 39 percent greater than the 1986/87 pack, due to the sizable harvest and low frozen inventories. For the second consecutive year, the percentage of strawberries diverted for processing exceeds the volume destined for the domestic fresh market. A producer cooperative processing plant is now operating at partial capacity. This is enabling low income producers to withhold supplies from the private processing plants, freeze them in the cooperative plant and await better prices in the frozen product market.

The following table presents Mexico's fresh and frozen strawberry production.

	1985/86	1986/87	1987/88 1/
Area harvested (hectares)	4,000	4,750	6,000
Production, fresh (tons)	68,000	90,900	120,000
Production, frozen (tons)	28,052	39,753	55,385

1/ Preliminary.

WEEKLY EXCHANGE RATE DEVELOPMENTS

On March 24, the dollar fell to its lowest level against the yen since early January. Concern over increased U.S. consumer spending raised fears about inflation and the U.S. trade deficit, prompting the world's major central banks to intervene to support the U.S. currency.

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Currencies	Current	-----Percent change from-----		
	rate 3/24/88	week ago 3/17/88	month ago 2/26/88	year ago 03/87
Argentine austral	4.8950	3.16	12.39	221.82
Australian dollar	1.3472	-1.00	-3.06	-7.31
Brazilian cruzado	111.7900	3.31	14.58	440.83
Canadian dollar	1.2419	-.56	-1.67	-5.82
South African rand	2.1322	-.76	2.77	3.11
Thai baht	25.1850	-.09	-.61	-2.73
British pound	0.5423	-.60	-3.84	-13.61
French franc	5.6980	-.81	-.28	-6.66
West German mark	1.6760	-.88	-.71	-8.62
Japanese yen	125.5700	-2.43	-2.16	-17.02
South Korean won	754.0000	-.42	-2.28	-11.68
New Taiwan dollar	28.5900	.00	.07	-17.66

Exchange rates are spot as of 3 p.m. Eastern Time, March 24.

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of March 17, 1988, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS	
94. Burundi wheat	Feb. 8, '88	10,000	
93. Central American countries barley malt (Costa Rica, El Salvador Guatemala, Honduras)	Jan. 27, '88	40,000	Sold 2,000
92. Turkey vegetable oil	Jan. 6, '88	80,000	Sold 56,400
91. Algeria barley malt	Dec. 30, '87	10,000	
90. Iraq barley malt	Dec. 23, '87	5,000	
89. Burundi barley malt	Dec. 16, '87	15,000	
88. Lebanon wheat	Dec. 11, '87	150,000	
87. Finland wheat	Dec. 9, '87	50,000	COMPLETE
	Jan. 21, '88	50,000	Sold 32,500
	Mar. 4, '88	150,000	
86. Mexico wheat	Dec. 2, '87	200,000	COMPLETE
	Mar. 3, '88	600,000	
85. Zaire frozen poultry	Nov. 30, '87	7,000	
84. China dairy cattle	Nov. 18, '87	3,000 head	Sold 185
83. Bulgaria barley	Nov. 17, '87	150,000	COMPLETE
82. Bulgaria wheat	Nov. 17, '87	150,000	COMPLETE
	Jan. 4, '88	200,000	
81. Gulf countries frozen poultry (Bahrain, Kuwait Oman, Qatar, United Arab Emirates)	Nov. 3, '87	16,000	Sold 3,388

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

80.	Saudi Arabia frozen poultry	Nov. 3, '87	20,000	Sold 500
79.	Hungary barley	Oct. 30, '87	100,000	
78.	Algeria vegetable oil	Oct. 22, '87	60,000	Sold 54,000
77.	Morocco vegetable oil	Oct. 13, '87	60,000	Sold 12,000
76.	Tunisia vegetable oil	Sept. 24, '87	60,000	Sold 36,000
75.	Singapore frozen poultry	Sept. 24, '87	2,000	Sold 182.3
74.	Near East table eggs (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates, Yemen)	Aug. 27, '87	50 million eggs	COMPLETE
73.	Saudi Arabia dairy cattle	Aug. 27, '87	2,000 head	Sold 1,870 head
72.	Iraq barley	Aug. 10, '87	150,000	COMPLETE
		Dec. 28, '87	100,000	COMPLETE
71.	Brazil wheat	July 30, '87	300,000	Sold 66,000
70.	Colombia wheat	July 30, '87	300,000	Sold 146,000
69.	Israel wheat	May 29, '87	200,000	
68.	Bangladesh wheat	May 22, '87	100,000	COMPLETE
		July 8, '87	50,000	COMPLETE
		Aug. 12, '87	150,000	Sold 144,500
		Sept. 10, '87	300,000	
67.	Soviet Union wheat	Apr. 30, '87	4,000,000	COMPLETE
		Oct. 15, '87	65,000	COMPLETE
		Nov. 9, '87	2,400,000	COMPLETE
		Nov. 27, '87	2,350,000	COMPLETE
		Jan. 29, '88	2,000,000	Sold 1,999,800
		March 18, '88	1,000,000	
66.	Turkey rice	Apr. 3, '87	70,000	COMPLETE
65.	Colombia barley malt	Apr. 3, '87	15,000	
64.	Iraq table eggs	Feb. 20, '87	189 million eggs	Sold 178 million
63.	Canary Islands poultry	Feb. 9, '87	5,000	Sold 4,000
62.	Nigeria wheat	Jan. 28, '87	500,000	
61.	China wheat	Jan. 26, '87	1,000,000	COMPLETE
		Aug. 18, '87	1,000,000	COMPLETE
		Nov. 17, '87	1,000,000	COMPLETE
		Dec. 11, '87	1,000,000	COMPLETE
		Feb. 5, '88	1,200,000	Sold 940,000
60.	Iraq wheat	Jan. 16, '87	800,000	COMPLETE
		Oct. 26, '87	1,000,000	Sold 257,000
59.	Switzerland barley or sorghum	Jan. 16, '87	250,000	Sold 9,000
58.	Poland wheat	Jan. 7, '87	500,000	COMPLETE
		July 2, '87	500,000	COMPLETE
		Dec. 1, '87	1,000,000	Sold 975,000
		March 22, '88	500,000	
57.	Poland barley or sorghum	Dec. 31, '86	200,000	COMPLETE
		Dec. 14, '87	500,000	Sold 159,000

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

56. Romania wheat	Dec. 23, '86	250,000	
55. Iraq poultry	Dec. 22, '86	60,000	COMPLETE
	Oct. 2, '87	10,000	Sold 5,000
	Nov. 25, '87	30,000	
54. Dominican Republic table eggs	Dec. 9, '86	25 million eggs	Sold 11.1 million eggs
53. Zanzibar wheat flour	Dec. 9, '86	20,000	Sold 6,000
52. Tunisia barley	Dec. 1, '86	150,000	COMPLETE
	March 23, '88	350,000	
51. Gulf countries (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	500 head	COMPLETE
	Aug. 27, '87	1,500 head	
50. West Africa (Benin, Burkina Faso, Cameroon, Cote d'Ivoire, Ghana, Gabon, Liberia, Niger, Togo) wheat	Oct. 30, '86	345,000	Sold 198,200
	June 15, '87	185,000	
	Feb. 4, '88	50,000	
49. Dominican Republic poultry	Oct. 29, '86	1,500	COMPLETE
	Jan. 12, '88	2,000	
48. Philippines barley malt	Oct. 20, '86	60,000	Sold 40,000
47. Cameroon wheat flour	Oct. 14, '86	20,000	Sold 6,000
46. Romania barley	Sept. 24, '86	200,000	Sold 125,000
45. Venezuela barley malt	Sept. 4, '86	100,000	
44. Cyprus barley	Aug. 26, '86	150,000	Sold 118,000
43. Canary Islands wheat	Aug. 8, '	,000	Sold 7,300
42. Egypt semolina	Aug. 6, '86	30,000	Sold 23,000
	Sept. 29, 1987		Balance withdrawn
41. Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40. Canary Is. dairy cattle	July 28, '86	3,000 head	Sold 2,985
39. Hong Kong table eggs	July 28, '86	44 million eggs	COMPLETE
	Nov. 16, '87	48 million eggs	COMPLETE
38. Senegal wheat	July 17	,000	COMPLETE
	Sept. 11, '87	110,000	
37. India vegetable oil	July 8, '86	25,000	COMPLETE
	Dec. 15, '87	300,000	Sold 100,000
36. Jordan barley	June 17, '86	60,000	COMPLETE
	Nov. 12, '86	100,000	
35. Israel barley	June 17, '	.000	COMPLETE
	Sept. 14, '87	200,000	COMPLETE (206,200)
34. Tunisia dairy cattle	May 29, '86	4,000 head	COMPLETE
33. Algeria dairy cattle	May 29, '86	5,000 head	COMPLETE
32. Sri Lanka wheat	May 16, '86	125,000	COMPLETE
	March 5, '87	95,000	COMPLETE
	Aug. 20, '87	240,000	Sold 90,000

EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

31. Saudi Arabia barley	May 7, '86	500,000	COMPLETE
	Aug. 6, '86	250,000	COMPLETE
	Sept. 16, '86	300,000	COMPLETE
	Oct. 8, '86	200,000	COMPLETE
			(201,000)
	Jan. 5, '87	1,250,000	COMPLETE
	May 15, '87	500,000	COMPLETE
	Aug. 4, '87	500,000	COMPLETE
30. Algeria barley	Apr. 17, '86	500,000	Sold 498,000
29. Morocco dairy cattle	Apr. 16, '86	4 000 head	COMPLETE
	Dec. 8, '87	7,500 head	
28. Turkey dairy cattle	Apr. 16, '86	5,000 head	COMPLETE
	June 18, '86	5,000 head	COMPLETE
	Nov. 18, '87	10,000 head	
27. Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
	Sept. 12, '86	10,000 head	Sold 3,681
	Oct. 19, '87		Withdrawn
26. Yemen poultry feed	Apr. 14, '86	150,000	Sold 111,468
	Dec. 1, '87	186,500	
25. Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
	June 24, '86	200,000	COMPLETE
	Oct. 7, '86	500,000	Sold 417,050
	Oct. 19, '87	500,000	
24. Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
	June 18, '87	8,000 head	COMPLETE
	Oct. 5, '87	8,000 head	Sold 4,000
23. Syria wheat	Apr. 8, '86	700,000	CANCELED
22. Benin wheat (remaining 15,000 tons transferred to West Africa	Apr. 7, '86	45,000	COMPLETE
21. Algeria table eggs	Apr. 4, '86	500 million	eggs
	Sept. 29, '87		Withdrawn
20. Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 6,028
19. Jordan wheat	Mar. 19, '86	75,000	COMPLETE
	June 20, '86	75,000	COMPLETE
	Dec. 31, '86	225,000	COMPLETE
	Mar. 2, '86	350,000	
18. Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
	Aug. 22, '86	800,000	Sold 700,000
	Feb. 3, '88	725,000	
17. Algeria wheat flour	Feb. 25, '86	100,000	
	Sept. 29, '87		Wit' drawn
16. Algeria semolina	Feb. 11, '86	250,000	Sold 30,000
	Oct. 9, '87	Allocation	COMPLETE
		reduced	
	Oct. 9, '87	50,000	
15. Philippines wheat	Jan. 7, '86	150,000	COMPLETE
			(152,400)
	Aug. 10, '87	500,000	COMPLETE
	Feb. 11, '88	500,000	125,000

EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

14. Zaire wheat	Dec. 27, '85	35,000	COMPLETE
	May 15, '86	45,000	COMPLETE
	Oct. 10, '86	40,000	COMPLETE
	July 16, '87	80,000	Sold 79,000
	Feb. 4, '88	160,000	
13. Nigeria barley malt	Dec. 10, '85	100,000	Sold 93,464
12. Iraq wheat flour	D . 9, '85	150,000	COMPLETE
	Jan. 7, '87	175,000	Sold 75,000
11. Egypt poultry	Nov. 26, '85	8,000	COMPLETE
	Mar. 21, '86	15,000	COMPLETE
	June 18, '86	5,000	COMPLETE
	July 8, '86	15,000	COMPLETE
	Dec. 19, '86	25,000	COMPLETE
	Feb. 27, '87	6,000	COMPLETE
10. Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
	May 15, '86	30,000	COMPLETE
9. Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
	Sept. 29, '87		Balance withdrawn
8. Jordan rice	Nov. 8, '85	40,000	COMPLETE
	Jan. 13, '87	60,000	Sold 13,700
7. Turkey wheat	Oct. 16, '85	500,000	COMPLETE
			(506,600)
	May 8, '86	500,000	Sold 248,000
6. Morocco wheat	Sept. 30, '85	1,500,000	COMPLETE
	Dec. 9, '86	790,000	COMPLETE
	July 1, '87	500,000	COMPLETE
	Nov. 23, '87	1,500,000	Sold 650,000
5. Yemen wheat	Sept. 6, '85	100,000	COMPLETE
	Jan. 26, '87	100,000	COMPLETE
	Oct. 22, '87	100,000	COMPLETE
4. Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
	Apr. 14, '86	100,000	COMPLETE
	May 18, '87	100,000	Sold 50,000
	Oct. 22, '87	100,000	
3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE
			(512,500)
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	COMPLETE
	Oct. 8, '86	1,000,000	COMPLETE
	July 8, '87	500,000	COMPLETE
	Nov. 30, '87	1,000,000	Sold 735,500
2. Egypt wheat flour	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	Sold 356,000

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

1. Algeria wheat (ex durum)	June 4, '85	1,000,000	COMPLETE
wheat (ex durum)	Apr. 10, '86	1,000,000	COMPLETE
durum	Nov. 10, '86	300,000	COMPLETE
durum	Mar. 16, '87	300,000	COMPLETE
durum	July 24, '87	300,000	COMPLETE
durum	Oct. 29, '87	300,000	COMPLETE
wheat (all)	Dec. 31, '87	1,000,000	Sold 591,000

EXPORT ENHANCEMENT PROGRAM SUMMARY

Announced as of March 24, 1988

Announced to Date* 56,494,290 tons grains and products (grain equivalent)
 356 million table eggs
 227,500 tons frozen poultry
 91,181 head dairy cattle
 585,000 tons vegetable oil

Sold to Date 35,612,359 tons wheat
 2,107,466 tons flour (grain equivalent)
 5,397,154 tons barley
 72,610 tons semolina (grain equivalent)
 174,948 tons barley malt (grain equivalent)
 229,000 tons sorghum
 123,700 tons rice
 111,468 tons poultry feed
 283,400 tons vegetable oil
 148,589 tons frozen poultry
 64,749 head dairy cattle
 330,950,820 table eggs

Total Sales Value: \$4,259.3 million
 Estimated Bonus Book Value: \$2,680.1 million
 Market Value of Award : \$1,910.6 million

*Does not include withdrawn programs.

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Selected International Prices

Item	:	March 29, 1988	:	Change from	:	A year
	:		:	a week ago	:	ago
ROTTERDAM PRICES 1/		\$ per MT	\$ per bu.	\$ per MT		\$ per MT
Wheat:						
Canadian No. 1 CWS-13.5%.10/		156.00	4.25	+1.00		155.00
U.S. No. 2 DNS/NS: 14%.10/		148.50	4.04	+0.50		136.00
U.S. No. 2 S.R.W.11/		145.00	3.95	+1.75		124.00
No. 3 H.A.D.....10/		164.50	4	^ .00		158.00
Canadian No. 1 A: Durum10/		166.50	4.53	+1.50		169.00
Feed grains:						
U.S. No. 3 Yellow Corn....		110.75	2.81	+1.00		87.00
Soybeans and Meal:						
U.S. No. 2 Yellow.....		268.00	7.29	+5.25		N.A.
Brazil 47/48% Soya Pellets		243.50	--	+7.50		183.00
U.S. 44% Soybean Meal.....		237.00	--	+7.00		177.00
U.S. FARM PRICES 3/						
Wheat		101.40	2.76	+1.84		96.99
Barley.....		71.65	1.56	+1.84		N.Q.
Corn.....		74.41	1.89	+1.99		73.03
Sorghum.....		64.15	2.91 2/	+0.43		N.Q.
Broilers.....		1,066.14	--	+28.66		1,067.03
EC IMPORT LEVIES						
Wheat 5/.....		232.74	6.33	+3.99		221.03
Barley.....		214.47	4.67	+2.74		217.67
Corn.....		214.90	5.46	+6.05		207.34
Sorghum.....		214.90	5.46	+6.05		212.33
Broilers 4/ 6/ 8/.....		546.00	--	-9.00		509.00
EC INTERVENTION PRICES 7/ 9/						
Common wheat(feed quality)		224.70	6.12	+3.86		220.55
Bread wheat (min. quality)		235.86	6.42	+4.04		230.83
Maize.....		235.86	5.99	+4.04		230.83
Barley and all other feed						
grains, excluding maize.		224.70	--	+3.86		220.55
Broilers 4/ 6/.....		1,609.00	--	+2.00		1,566.00
EC EXPORT RESTITUTIONS (subsidies)						
Wheat		131.35	3.57	+1.70		N.Q.
Barley.....		131.83	2.87	+1.01		157.23
Broilers 4/ 6/ 8/.....		673.00	--	+114.00		419.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/ April/May delivery. 11/ June delivery. N.A.=None authorized. N.Q.=Not quoted. Note: Basis March delivery.

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